APPLICATION REFERENCE GUIDE

Purpose of this Guide

This guide is designed to help you complete your Shanly Foundation grant application successfully. It explains how to apply, what to include, and what to expect once your application has been submitted.

For all eligibility, compliance, and funding requirements, please refer to the full **Application Terms and Conditions**. The latest version is always available on the Shanly Foundation website.

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1. Grant Categories

You may apply to only one fund per year:

a. General Applications Fund

- Open throughout the year to a wide range of applicants within our local area (please refer to the website for eligibility criteria).
- No deadlines or fixed application windows.
- Trustees meet monthly to consider and award grants.

b. Training & Careers in Construction Fund

- Open all year for projects supporting skills, training, and careers in construction.
- Trustees meet monthly to consider and award grants.
- Aimed at larger or multi-year projects.

c. Action Against Homelessness Fund

- Open once per year for a limited window (dates published each January).
- Supports organisations tackling homelessness or providing training and employment for those at risk.
- Aimed at larger or multi-year grants.

Please note:

- Applications received outside an open funding window will be rejected without review.
- Applications may be made for:
    - Projects and specific activities – defined scope and timeframe.
    - Unrestricted core funding – for operational costs (normally up to 2% of annual budget).
    - Capital projects – for building works, repairs, or essential equipment (planning permission must be in place before applying).

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2. Application Process and Timeline

2.1 Submission

- All applications must be submitted through the online portal.
- Applications should be submitted at least 10 weeks before a funding decision is needed.
- For time-sensitive projects or events, please apply earlier to avoid disappointment.

2.2 What Happens Next

1. You will receive an email confirming receipt and your application reference ID.
2. The Awards Officer will review your application and may request additional information.
3. Trustees meet monthly to consider applications (except during scheduled breaks).
    - For the Action Against Homelessness Fund, shortlisting takes place within eight weeks of the window closing.
4. You will be notified of the Board's decision in writing within 10 days of the meeting.
5. If successful, payment is normally made within two weeks of receiving your Award Confirmation Letter.

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3. Creating and Managing Your Online Account

3.1 New Applicants

- Complete the eligibility checker on our website to access the online portal.
- Follow the steps to create your organisation account.

3.2 Returning Applicants

- Log in with your registered email and password.
- Use "Forgot Password" to reset if needed.

3.3 Managing Your Application

- Update organisation or contact details via your account dashboard.
- To transfer ownership of an application, open the submitted request and select "Change ownership of application" (only to a registered email address).
- All communication regarding your application, including award notifications, takes place within the portal.

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4. What to Include in Your Application

Your application form will guide you step by step. You can save and return at any time.

4.1 Essential Information

- The need your project addresses and why it matters.
- How your project will meet that need and the expected outcomes.
- Your most recent financial accounts (audited if applicable).
  If your financial situation has changed significantly, include a short explanation of the reasons and how you are managing it.

4.2 Project Delivery Plan

Required for:

- Applications of £10,000 or more,
- Multi-year grants, or
- Capital projects.

Include:

1. A detailed, year-by-year budget.
2. A funding plan showing confirmed and targeted income.
3. A timeline of delivery.
4. Any shortfall still to be raised.

4.3 Capital Projects

Also include:

- Proof of planning or relevant permissions.
- Evidence of a minimum 20-year lease (if applicable).
- Project management details and experience.
- Quotes obtained before selecting contractors.
- Funds raised or pledged to date.
- Contingency for overspend.

Note: Capital applications submitted before planning permission is secured will not be considered.

4.4 Bank Account Verification

Upload one recent (within 6 months) bank statement showing:

- Bank name
- Account name
- Sort code
- Account number

Note: Statements without an account name delay payment.

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5. How Much to Apply For

Shanly Foundation typically contributes part of a project's total cost rather than funding it in full.

- Most General Fund grants are under £10,000.
- The Construction and Homelessness funds may award larger, multi-year grants (up to around £150,000).

Note: Refer to the **Grants** page on our website for examples of previous awards.

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6. Application Tips

1. Keep your answers concise and focused — bullet points are fine.
2. Do not use commas or decimals in numeric fields.
3. Include your organisation name in all attached file titles.
4. Convert files to PDF before uploading (do not send secured files).
5. Replace spaces in filenames with underscores or hyphens.
6. Click Attach after selecting a document — files do not upload automatically.
7. You may upload a short note if a required document is unavailable at the time.
8. You can print your application and messages from the portal if required.

Note: Forgetting to click *Attach* after choosing a file. Always confirm the filename appears before moving on.

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7. Monitoring and Evaluation

After receiving a grant:

- You will be invited by email to complete a Monitoring and Evaluation Form once your project ends or after one year (whichever comes first).
- You may upload photos and supporting documents through the portal.
- Automatic reminders are sent — please keep contact details current.

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8. Reapplication

- You may reapply 12 months after your last award or rejection letter.
- If you hold a multi-year award, you may reapply during the final year of that grant.
- Full eligibility details are available in the **Application Terms and Conditions**.

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9. Important Notes

- Applications must be submitted via the online portal.
- We are unlikely to fund the full cost of a project.
- Planning permission (if required) must be secured before applying.
- Capital pledges are released once the conditions in your offer letter are met.
- Keep your contact details up to date — all communication is via the portal.